

Welcome to CalJOBS Participant Reports Training. Participant reports refer to data we can gather from individuals who are, at least registered in CalJOBS, and may be enrolled in a WIOA program and/or special grant.

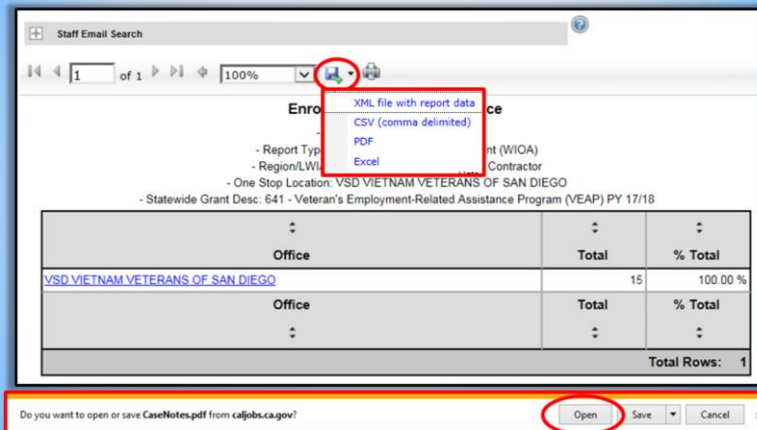
Participant Reports

- Enrolled Individuals
- Services Provided Individuals
- Credentials
- Case Closure Reportable Performance Indicators
- Individual Case Notes
- Saving to My Reports

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We will review the following participant reports, including where to find them and some suggested filter options.

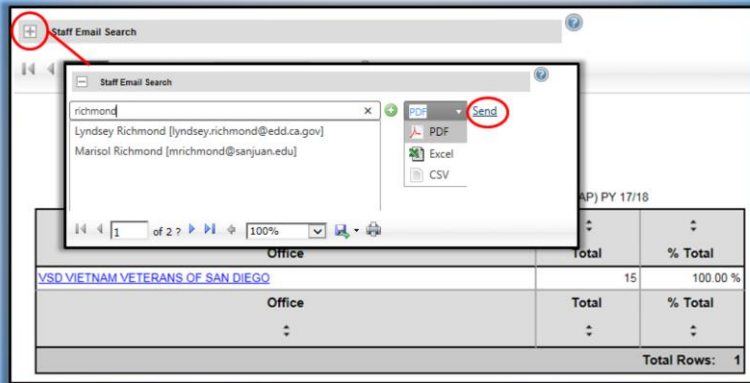
Helpful Hints – Export a Report



Before we look at the reports, we want to point out a few helpful hints when running reports.

First, any report in CalJOBS can be exported. To do this, click on the save icon (floppy disk image) and select which method you would like to export the report (e.g. PDF, Excel, CSV). After selecting the file type, a pop-up will appear at the bottom of the screen to open the exported document. Select “Open” to view the document, or “Save” to save and open the document.

Helpful Hints – Email a Report



Another helpful hint is the Staff Email Search feature. This allows you to send the results of the report in PDF, Excel, or CSV, to any staff member who has a staff CalJOBS login.

Within the results page of a report, select the “+” icon next in the **Staff Email Search** gray box. After selecting the “+” icon, a search box will appear. Type in the staff member’s first, last, or first and last name and the results will populate below. Select the staff member you would like to email the report to. Next, choose the format that you would like the report to appear by selecting it in the drop-down. Finally, select the Send link.

Helpful Hints – Toggle between pages of a report

Next page or back

Return to “parent report” button

The screenshot shows a report titled "Enrolled Individuals - By Office". The report includes a search bar at the top left and a navigation bar with a "1 of 2" indicator and a "100%" dropdown. The table below shows the following data:

Office	Total	% Total
VSD VIETNAM VETERANS OF SAN DIEGO	15	100.00 %
Office	Total	% Total
Total Rows: 1		

The last tip we will review is how to toggle between pages on a report.

If a report’s results contain more than one page of data, you will see a “1 of 2?” in the top left corner. To navigate to the next page of the report, select the blue arrow to the right of the “?” mark. To navigate back to the previous page, select the back arrow to the left of the “1”.

When you run a report that categorizes the results, for example “by Office”, “by Region/LWIA”, “by 15% Grant”, the results are in summary form and contain links to look at more detailed results – or the “List” results. When you click on the link to look at the details of the report, you are moving away from the “Parent” report. While on the List report, you can navigate back to the “Parent” report by clicking the blue arrow to the left of the “100%” drop-down box.



The **Enrolled Individuals** report will provide a summary and/or list of individuals enrolled in a program. There are many ways to run this report, including by Office, Region, and WIOA 15% Grant.

In this example, we will run the report by One Stop Office and will be able to choose “Grant” as a filter. Your participants must be enrolled to show in this report. If they are not showing in this report, participation was not created to enroll.

The screenshot shows a 'Report Filters' form with the following sections and fields:

- Program Section (Callout 1):**
 - Program: Title I - Workforce Development (WIOA)
 - Customer Group: None Selected (dropdown menu with options: None Selected, Adult, Youth, Dislocated Worker)
 - Partner Program Status: ☒ Active ☐ Inactive ☐ All
 - Partner Program: None Selected
- Location Section (Callout 2):**
 - Region/LWIA: (Press Ctrl to select multiple) - WIOA Statewide Grant Contractor
 - Office Status: ☒ Active ☐ Inactive ☐ All
 - Office Location: (Press Ctrl to select multiple) - None Selected (dropdown menu with options: (Training) Generic Statewide Contractor Office, ABLE-DISABLED ADVOCACY, INC., ABLE-DISABLED ADVOCACY, INC.)
- WIA-Specific Section (Callout 3):**
 - Grant Status: ☒ Active ☐ Inactive ☐ All
 - Grant Type: None Selected
 - Available Grants: (Press Ctrl to select multiple) - 638 - HACoLA Project, 639 - DEA PY 17/18, 640 - SBO General Youth Grant, 641 - Veterans Employment Related Assistance Program (VEAR)
- Date Section (Callout 4):**
 - Date Filter: Active
 - Date Range: Current Program Year
 - From: 07/01/2018 (mm/dd/yyyy)
 - To: 06/30/2019 (mm/dd/yyyy)

A 'Run Report' button is located at the bottom center of the form. A small number '7' is visible in the bottom right corner of the form area.

1. In the **Program** area, select “Title I- Workforce Development (WIOA)” in the **Program** field. Leave the other fields as none selected.

2. In the **Location** area, go to the **Region/LWIA** and **Office Location** fields and make appropriate selections. Your location will most likely auto populate. If not, be sure to choose the correct Region and Office Location. If you are a Non-Local Area, be sure your Region/LWIA is “WIOA Statewide Grant Contractor”.

3. Next in the **WIA-Specific** area, select your grant in the **Available Grants** field. To find your grant faster, you can use the **Grant Type** filter to narrow the results.

4. Finally in the **Date** area, select “Active” in the **Date Filter** field. Then, select your appropriate dates in the **Date Range** fields. Then, select “Run Report”.

Enrolled Individuals- Results

Staff Email Search

1 of 1 100%

Enrolled Individuals - By Office

- Active: 7/1/2018 to 6/30/2019
- Report Type: Title I - Workforce Development (WIOA)
- Region/LWA Name: WIOA Statewide Grant Contractor
- One Stop Location: VSD VIETNAM VETERANS OF SAN DIEGO
- Statewide Grant Desc: 641 - Veteran's Employment-Related Assistance Program (VEAP) PY 17/18

Office	Total	% Total
VSD VIETNAM VETERANS OF SAN DIEGO	15	100.00 %
Office	Total	% Total
Total Rows: 1		

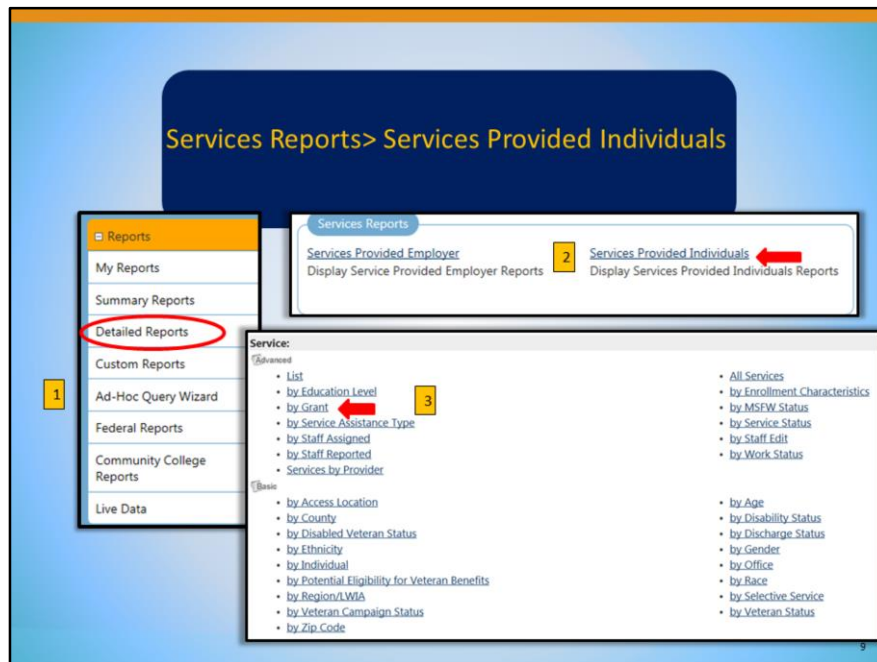
Enrolled Individuals - List

- Active: 7/1/2018 to 6/30/2019
- Report Type: Title I - Workforce Development (WIOA)
- Region/LWA Name: WIOA Statewide Grant Contractor
- One Stop Location: VSD VIETNAM VETERANS OF SAN DIEGO
- Statewide Grant Desc: 641 - Veteran's Employment-Related Assistance Program (VEAP) PY 17/18

User Name	State ID	App ID	First Name	Last Name	Age at Participation	City	State	Country	Office Location	Agency Code	Agency Name	Assigned Case Mgr	Active Date	Exit Date	Prior Participation	Map
21272136		18138197	CHARLES		44	San Diego	CA	US	VSD VIETNAM VETERANS OF SAN DIEGO	VSD	VSD -VSD	Congress Williams	06/26/2018		No	Map
21010962		18131931	Darin		52	San Diego	CA	US	VSD VIETNAM VETERANS OF SAN DIEGO	VSD	VSD -VSD	Mark Brushwood	06/29/2018		No	Map
21876213		18142053	Daniel		62	Escondido	CA	US	VSD VIETNAM VETERANS OF SAN DIEGO	VSD	VSD -VSD	Carlynn Stullin	06/22/2018		No	Map
21880228		18172462	JEREMIE		35	San Diego	CA	US	VSD VIETNAM VETERANS OF SAN DIEGO	VSD	VSD -VSD	Mark Brushwood	07/05/2018		No	Map

In these results, we see the count of individuals that are enrolled in an organization's particular special grant, and were active within the designated date range.

Note: If you do not see as many participants as you may have thought were enrolled, there is a good chance that some of your individuals are NOT enrolled, meaning Participation might not have been created or you have not yet added an activity code that is funded by your special grant.



Next we will review the **Services Provided Individuals Report** which shows information about specific services provided to individuals by the staff members. You will want to run this report “by Grant”.

Of course, this report can be used to see what services are being provided, but this report can also be ran using different filters to show the demographics of those you serve.

The screenshot shows a 'Report Filters' form with the following sections and callouts:

- 1** (Program): Program: Title I - Workforce Development (WIOA) (selected); Customer Group: None Selected (selected); Attending School at Program Enrollment: None Selected (selected).
- 2** (Location): Region/LWDB Status: Active (selected); Region/LWDB: WIOA Statewide Grant Contractor (selected); Office Status: Active (selected); Office Location: VISALIA USD/VISALIA ADULT SCH. (selected).
- 3** (WIA-Specific): Grant Status: Active (selected); Grant Type: None Selected (selected); Available Grants: 641 - Veteran's Employment-Related Assistance Program (VEAP) (selected).
- 4** (Date): Date Filter: Actual Begin Date (selected); Date Range: Custom Date (selected); From: 02/01/2018; To: 04/26/2018.

A 'Run Report' button is located at the bottom center, and the page number '10' is in the bottom right corner.

1. In the **Program** area, select “Title I- Workforce Development (WIOA)” in the **Program** field. Leave the other fields as none selected.
2. In the **Location** area, go to **Region/LWIA** and **Office Location** and make appropriate selections. Your location will most likely auto populate. If not, be sure to choose the correct Region and Office Location. If you are a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
3. Next in the **WIA-Specific** area, select your grant in the **Available Grants** field. To find your grant faster, you can use the **Grant Type** filter to narrow the results.
4. Finally in the **Date** area, select “Actual Begin Date” in the **Date Filter** field to see services that have actually been provided, not just scheduled to be provided. If you would like to include those activities with a Projected Begin date within the range, select “Projected Begin Date”. If you would like to see all services that have been entered, whether they have actually begun or not, select “Create Date”. Then, select your appropriate dates in the **Date Range** field.

Services Provided Individuals- Results

Services Provided Individuals - by Grant					
- Region/Lia: WIOA Statewide Grant Contractor - Office: VSD VIETNAM VETERANS OF SAN DIEGO - Grant: 641 - Veteran's Employment-Related Assistance Program (VEAP) PY 17/18 - Veteran Information From: Both - Date Field: Actual Begin Date - Start Date: 7/1/2018 - End Date: 6/30/2019					
Grant Number	Grant Description	Activity	Activity Description	Distinct Users	Total
1128	Veteran's Employment-Related Assistance Program (VEAP) PY 17/18	102	Initial Assessment	11	11
1128	Veteran's Employment-Related Assistance Program (VEAP) PY 17/18	112	Job Fair	1	1
1128	Veteran's Employment-Related Assistance Program (VEAP) PY 17/18	125	Job Search and Placement Assistance	18	22
1128	Veteran's Employment-Related Assistance Program (VEAP) PY 17/18	132	Resume Writing Workshop	1	1

Services Provided Individuals - By Grant Detail									
- Region/Lia: WIOA Statewide Grant Contractor - Office: VSD VIETNAM VETERANS OF SAN DIEGO - Grant: 641 - Veteran's Employment-Related Assistance Program (VEAP) PY 17/18 - Veteran Information From: Both - Date Field: Actual Begin Date - Start Date: 7/1/2018 - End Date: 6/30/2019									
User Id	State Id	Office	First Name	Last Name	City, State, Country	Service	Staff Created	Actual Begin Date	Staff Edited
		VSD VIETNAM VETERANS OF SAN DIEGO	JEROME		San Diego, CA, US	102 - Initial Assessment	Brushwood, Mark	07/05/2018	Brushwood, Mark
		VSD VIETNAM VETERANS OF SAN DIEGO	AUSTIN		San Diego, CA, US	102 - Initial Assessment	Brushwood, Mark	07/26/2018	Brushwood, Mark

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The results will provide a list of services provided by staff to those enrolled in an organization's program. To view the roster of individuals that received that service, click on the link in the Distinct Users column.



The **Credentials** report displays information entered into an individual's credentials ribbon within their program application, if any. This report is useful in gathering credential attainment information for a group of individuals (ie. enrolled in a special grant).

The screenshot shows a report generation interface with four numbered callouts:

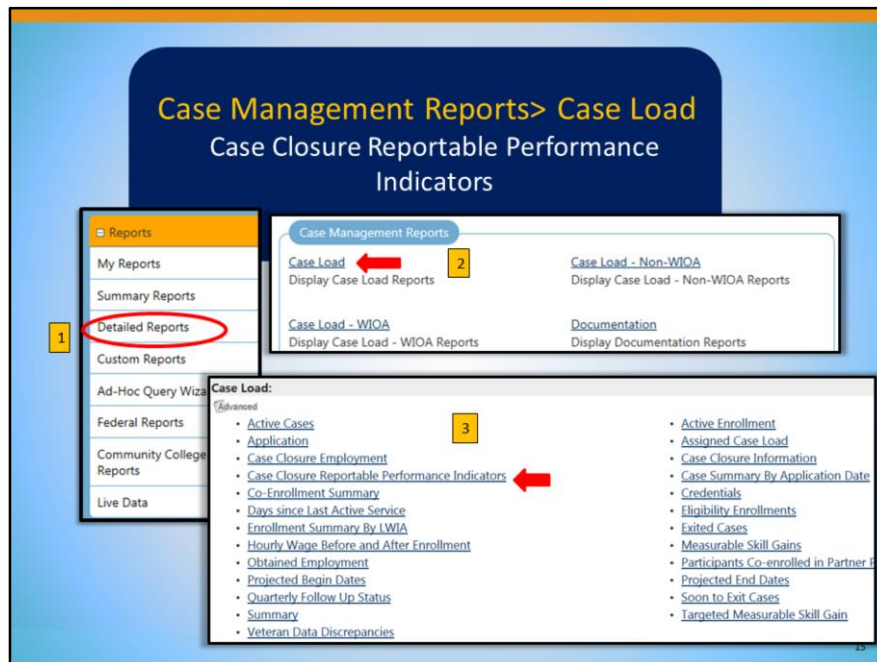
- 1**: Program dropdown menu set to "Title I - Workforce Development (WIOA)".
- 2**: Region/LWDB dropdown menu set to "Sacramento Employment and Training Agency".
- 3**: Grant Status set to "Active" and Grant Type set to "Statewide Adult".
- 4**: Filter By Date set to "Credential Date" and Date Range set to "Last 30 Days".

In this slide, we will look for credential information for participants enrolled in a special grant project. In the first filter area, **Customer Group**, select the appropriate group for which you are searching. If you do not select a customer group, the report will pull data on all customer groups, and will not provide a column that identifies the customer group.

Next, select the appropriate **Region** and **Office** Location. In the Grant section, select the appropriate **Grant Type**. Depending on what you select in the Grant Type field, the **Available Grants** will populate. Select the appropriate grant.

Finally select *Credential Date* from the **Filter By Date** filter and enter the appropriate **Date Range**. Select “Run Report”.

<div> <div>Credentials</div> <div> <div>- Program: Title I - Workforce Development (WIOA)</div> <div>- Customer Group: Statewide Adult</div> <div>- Region/LWA: Sacramento Employment and Training Agency</div> <div>- Grant Type: Statewide Adult</div> <div>- Grant: 572 - ELL Navigator</div> <div>- Credentials with Provider Only: No</div> <div>- Filter By Date: Credential Date</div> <div>- Date Range: 3/11/2018 - 4/9/2018</div> </div> </div>												
User ID	State ID	App ID	Name	Office	Participation Date	Closure Date	Exit Date	Assigned Staff	Credential Type	Credential Date	Provider	Page Reported
11539604	1002372388	17868528	Xuan, Hanchu	SAC ELK GROVE USD AJCC	03/08/2018			Almond, Timothe	Occupational Skills Certificate or Credential - No Child Left Behind Paraprofessor Certification	03/15/2018	SETA/Sacramento Works	Enrollment ID: 10257616
User ID	State ID	App ID	Name	Office	Participation Date	Closure Date	Exit Date	Assigned Staff	Credential Type	Credential Date	Provider	Page Reported
					Total Individuals: 1				Total Credentials: 1			



The **Case Closure Reportable Performance Indicators** report shows performance indicator information for any credentials that may have been received, school status and diploma, and employment placement information. Much of this data is derived from the Case Closure form in an individual's profile. If staff do not fill out the Closure Form, this report will not contain any data.

Report Filters

Report Type
Report Type: Both - Displays all closure types

Program
Program: Title I - Workforce Development (WIOA)
Customer Group: None Selected
Partner Program Status: ☒ Active ☐ Inactive ☐ All
Partner Program: None Selected

Location
Region/LWIA Status: ☒ Active ☐ Inactive ☐ All
Region/LWIA: WIOA Statewide Grant Contractor
Office Status: ☒ Active ☐ Inactive ☐ All
Office Location: JEWISH VOCATIONAL SERVICE SF

Filter By Date
Filter By Date: Actual Case Closure
Date Range: Last 30 Days
From: 02/07/2017
To: 03/08/2017

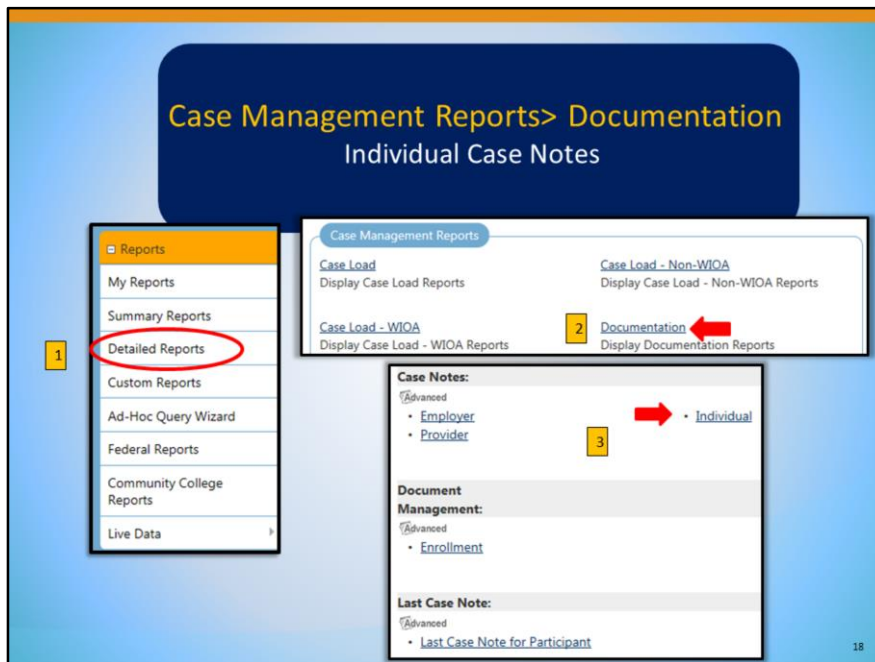
Run Report

1. In the **Report Type** area, select “Both- Displays all closure types” in the **Report Type** drop-down.
2. In the **Program** area, select “Title I- Workforce Development (WIOA)” in the **Program** field. Leave the other fields as none selected.
3. In the **Location** area, go to **Region/LWIA** and **Office Location** and make appropriate selections. Your location will most likely auto populate. If not, be sure to choose the correct Region and Office Location. If you are a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
4. Finally in the **Date** area, select “Actual Closure Date” in the **Filter by Date** field. Then, select your appropriate dates in the **Date Range** field.

Case Closure Reportable Performance Indicators-Results

Case Management Reports											
Case Closure Reportable Performance Indicators - Detail Report											
Report Type: Both - Displays all closure types											
Program: Workforce Innovation and Opportunity Act (WIOA) Program											
LWIA/Region: WIOA - Statewide Grant Contractor											
Office: L & P Career Center											
Grant: 369 - 1002 - WAF 4.0 VETS Accelerator											
Filter By: Date: Actual Case Closure											
Date Range: 02/14/2017 - 03/15/2017											
* Indicates that column may be used for federal reporting when all countable criteria is met, please refer to your programs guidance on when data is countable for performance											
99 - WIOA Statewide Grant Contractor											
App #	State ID	Name	Office	Case Manager	Credential*	Credential Other	Credential Date*	School Status*	Attained Diploma*	Diploma Date*	Entered Employment
2238819	31806	John Test	L & P Career Center		Occupational Skills Certificate or Credential		02/22 /2017	Not attending school at S. Graduate			3/5/2017
2238891	31809	John Testler	L & P Career Center					Not attending school at S. Graduate			3/13/2017
App #	State ID	Name	Office	Case Manager	Credential*	Credential Other	Credential Date*	School Status*	Attained Diploma*	Diploma Date*	Entered Employment

The results will show a list of Case Closures Reportable Performance Indicators to those enrolled in your program, and for whom the Closure Form was completed. In this screenshot, the **School Status** and **Entered Employment** columns contain data.



This **Case Notes** report will retrieve case notes created for individuals. Staff can search for specific case notes in a variety of ways, including a popular keyword search that locates case notes based on a word or phrase in the subject field or the narrative field.

Report Filters

Report Type
 Report Type: Includes

Case Notes
 Case Note Subject:
 System Case Notes: (Where Contact Type = Form Insert) ☒ Exclude System Case Notes ☐ Include System Case Notes

Program
 Program Status: ☒ Active ☐ Inactive ☐ All
 Program:
 (Press Ctrl to select multiple items)

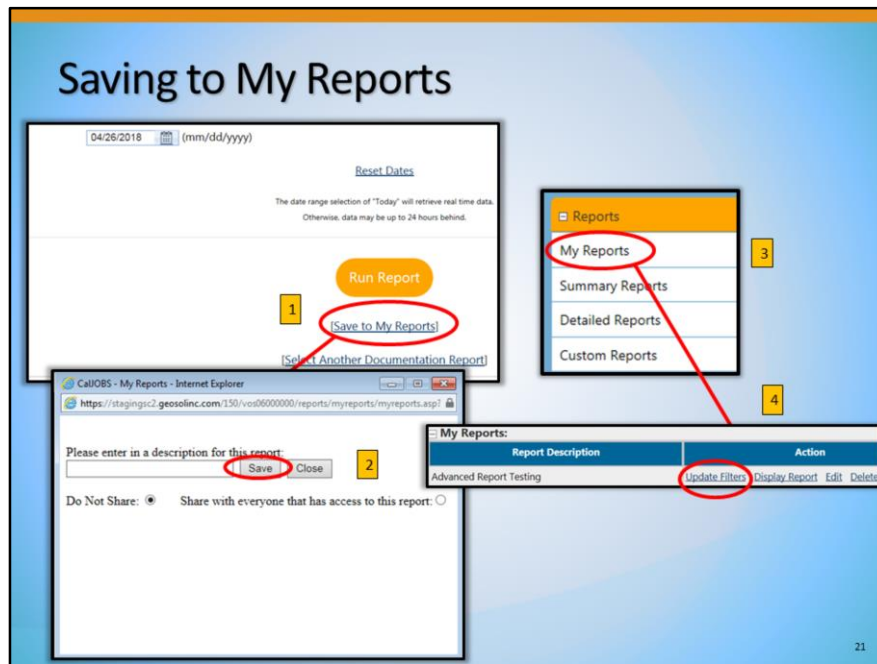
Location
 Region/LWIA Status: ☒ Active ☐ Inactive ☐ All
 Region/LWIA:
 (Press Ctrl to select multiple items)
 Office Status: ☒ Active ☐ Inactive ☐ All
 Office Location:
 (Press Ctrl to select multiple items)

Date
 Date Range:
 From: (mm/dd/yyyy)
 To: (mm/dd/yyyy)

1. In the **Report Type** area, select “Includes” or “Exact Match” from the **Report Type** drop-down.
2. In the **Case Notes** area, type in what word or number you want find that is included in the subject name of the case notes in the **Case Note Subject** field. If you are not looking for a particular word or number, leave this field blank.
3. In the **Program** area, select “Title I – Workforce Development (WIOA)”.
4. In the **Location** area, go to **Region/LWIA** and **Office Location**, and make appropriate selections. Your location will most likely auto populate. If not, be sure to choose the correct Region and Office Location. If you are a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
5. Finally in the **Date** area, select the appropriate date range in the **Date Range** field.

Individual Case Notes- Results

Case Management Report - Case Notes - Individual Case Notes Report									
Program: Workforce Innovation and Opportunity Act (WIOA) Program LWIA/Region: WIOA Statewide Grant Contractor Office: L & R Career Center Include System Case Notes: No Date Range: 02/14/2017 - 03/15/2017									
Userid	Individual	Created By	Create Date	Contact Date	Last Edited By	Last Edit Date	State ID	Case Subject	Case Notes
32910	Test, John	Rose, Rianna	3/7/2017	3/7/2017	Rose, Rianna	3/7/2017	31966	328 Case Note Test	Case Note Test
32914	Tester, John	Rose, Rianna	3/13/2017	3/13/2017	Rose, Rianna	3/13/2017	31969	328 Training Activity	Training Activity
Userid	Individual	Created by	Create Date	Contact Date	Last Edited By	Last Edit Date	State ID	Case Subject	Case Notes
Total Rows: 2									



If you would like to save a report and its filters to **My Reports**:

1. Choose the “Save to My Reports” link at the bottom of each report *before* you select the “Run Report” button.
2. You may receive a pop-up blocker message. Allow the pop-up, and name your report in the description area; choose “Save”.
3. Your report with the same filters will appear in **My Reports** from the **Report** left hand menu.
4. You can easily run the report by selecting “Update Filters” in the Action column when you are in your **My Reports**.

Questions



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For any questions concerning this module, please contact the Capacity Building Unit at CBUTraining@edd.ca.gov.